



READINESS ROUNDUP

November 18, 2005
Volume 1, Issue 2

A newsletter dedicated to preparing agencies and providers for the EIM/ESM service



In this issue:

- Performance Metrics
- Usability Testing
- Security
- Training
- Cost Reimbursement Invoicing
- Service Plans

Have questions about EIM/ESM ?

Submit your questions to:
POS.EIM-ESM@massmail.state.ma.us

Welcome!

Agencies and providers worked diligently this month to accomplish many readiness activities for the upcoming pilot of the EIM/ESM service. To name a few, business process analysis and organization management set-up for pilot agencies and provider organizations were successfully completed.



Recently, a group of WHN providers participated in an interactive demonstration of the EIM/ESM service. Donna Hackett of Morton Hospital said that it was **"...one of the most effective 'demo' programs I've been to in a long time. They [the presenters] deserve kudos!! I look forward to future training."** Thanks, Donna.

If you will be having a regional gathering with your organization, and would like a demonstration, please submit your request to:
POS.EIM-ESM@massmail.state.ma.us.

The number of organizations participating in readiness activities continues to grow. This month we welcome the Department of Mental Retardation, the Department of Social Services, and the Bureaus of Substance Abuse Services and Early Intervention at the Department of Public Health.

Readiness Update



Current readiness activities focus on **performance metrics, usability testing**, and completing **security roles**.

Performance metrics will be used to determine what gains will be realized by the implementation of the EIM/ESM service.

Data will be collected to establish current processing times for client enrollment, claims, invoices, and service delivery reports. This information will be used as a baseline for comparison against the same data that will be collected following EIM/ESM service implementation.

The comparison will identify quantifiable gains in performance associated with the EIM/ESM service. An evaluation tool is being distributed to help agency implementation teams capture this data.

Usability testing is being conducted by a representative group of providers and agencies who are testing the EIM/ESM service and will provide feedback on its ability to support their organization's business processes and requirements.

Through the usability testing process, participants are gaining hands-on experience and exposure to the EIM/ESM service. Participants will

Readiness Update cont'd

identify potential issues that require resolution. Phase one of usability testing comprises a limited set of functionalities. A complete set of functionalities will be included in phase two, which will occur in December.

Security roles ensure that users are able to perform job functions while seeing only pertinent data. Security roles also influence the specific training modules that staff will be assigned to complete. Security role assignments are currently being completed by pilot organizations. See the October issue for more information on security.



Training Corner



Training is key to the successful implementation of the new EIM/ESM service. For the past several months, project staff have been developing training materials designed to help users gain the knowledge, skills, and abilities needed to use this service. Training that will support pilot audiences will be:

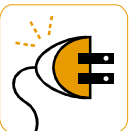
- **Role-based**, focusing on what users need to do their jobs
- **Instructor-led**, classroom training with "hands-on" system practice
- **Just-in-time**, with courses offered as close to "go-live" as possible
- **Audience-specific**, with courses developed for agency and provider needs

Project staff are working closely with agency and provider representatives to identify specific learning needs. We are also identifying training staff from pilot agencies to assist in the provision of training to pilot participants.

Once readiness activities associated with identifying end users and their security roles are completed, we will be able to put together a training schedule. Stay tuned for more information regarding when your organization will receive training on the EIM/ESM service.

Focus on Functionality

EIM Functionality- Cost Reimbursement Invoicing



The Enterprise Invoice Management service comprises four primary components: service delivery, claims and invoice processing, adjudications and adjustments, and fiscal management. **Cost reimbursement invoicing** is highlighted in this issue.

What are cost reimbursement invoices?

Cost reimbursement invoices are a combination of personnel summaries and monthly expenditure data for a contracted provider. They are not tied to specific clients. Instead, they represent a provider's request for payment according to spending categories (line items) established under a cost reimbursement contract. Supplemental invoices may be submitted at any time to correct an existing invoice.

How does EIM handle them?

Minimal data input will be required by providers as line items are pre-populated. Agencies will review and approve invoices in the system.

Line Item	Category	Program Component	FTE	Reimbursable Cost	Balance to Date	Invoice Amount	Current Balance
912	1-Direct Care / Program Staff	102 Program Director	100.0	\$6,000.00	\$2,800.00	\$0.00	\$2,800.00
913	1-Direct Care / Program Staff	104 Supervising Professional	100.0	\$2,000.00	\$1,700.00	\$0.00	\$1,700.00

Focus on Functionality cont'd

EIM Functionality, cont'd

Payment status is tracked through close integration with the Massachusetts Management Accounting and Reporting System (MMARS). Providers and agencies can check payment status in the EIM/ESM service at any time.



What is depicted in the screen shot?

Shown on the previous page is an Invoice Summary. It displays an at-a-glance view of contract specific and line item budget information. In this example, a provider has searched for a contract and is viewing the invoice summary. The user may then select a line item budget to input cost reimbursement amounts for invoicing. Category 1 invoices (related to staff) require a personnel summary, accessed via the left navigation bar. Modifications to line item budgets will be automatically updated.

Once line items are updated, providers can release and authorize the invoice for agency approval.

ESM Functionality- Service Plans



Enterprise Service Management comprises client management, eligibility and enrollment, service tracking and service plan management, and authorizations and consent management. This issue features **service plans**.

What are service plans?

A service plan is a timeline reflecting services provided to and scheduled for a client. Service plans track provider tasks, client appointments and referrals. They enable the resources assigned to and notes associated with service delivery to be recorded.

Why are they important?

Service plans allow authorized providers to plan, schedule, and record all client interactions from office consultations to specific medical

procedures. This system function will help to maximize service integration. Service plans provide a single place to look for a comprehensive overview of a client's progress from assessments to final diagnoses.

What is depicted in the screen shot?

Shown below is a view of the service plan calendar. It displays, in a calendar format, interventions planned for a specific client. In this example, a service plan task, "send enrollment package," has been recorded for October 2nd. Case tasks would appear in the column to the right.

From the left navigation bar, an authorized user can easily navigate to tasks, resources, cases, services, assessments, final diagnoses, and authorizations associated with this client. From the

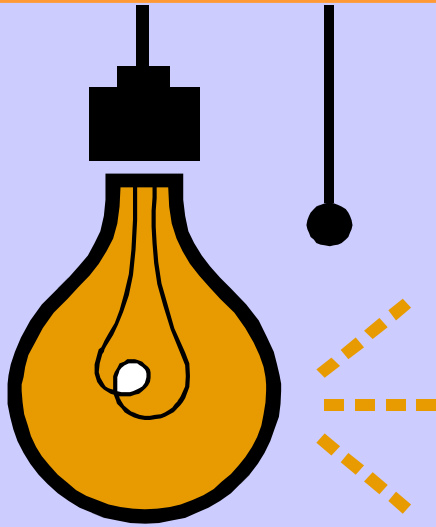
menu on the right, authorized users can quickly navigate to a specific month or year, to access future or historical data.

The screenshot shows the "Health and Human Services" interface for "Client #12703 : Jane Doe". The main area displays a calendar for "October 2005" with columns for "Service Plan Tasks" and "Case Tasks". A task "Send enrollment packet" is scheduled for October 2nd. Annotations include:

- Links to Notes, Tasks, Cases, Assessments, Authorizations, Services, etc.** pointing to the left navigation bar.
- Access historical data** pointing to the "View Records" button.
- Case Tasks** pointing to the "Case Tasks" column header.
- Service Plan Task for 10/2** pointing to the "Send enrollment packet" task.
- Links to manage the service plan** pointing to the "Manage Service Plan" menu.

The "Manage Service Plan" menu includes options: Add Plan Note, Add Appointment, Add Planned Service, Add Standard Task, Add Task From Template, Add Milestone, Add Professional Service, Add Institutional Service, Add Resource, and Add Case.

Updates and Reminders



Have a happy Thanksgiving! We look forward to continuing to meet with agency and provider staff to acquaint them with the EIM/ESM service. Upcoming venues include:

- 12/1 Bureau of Substance Abuse Services Kick-off
- 12/6 The Division of Community Health Promotion and Chronic Disease Control

Look for these topics in next month's Readiness Roundup!

- Unit Rate and Master Service Agreement claims (EIM)
- Consent Management (ESM)
- Training



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